



# Grain Transportation Report

*A weekly publication of the  
Transportation and Marketing Programs/Transportation Services Branch  
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Apr. 14, 2005

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The next  
release is  
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**First Quarter Ocean Freight Rates Decline, Increasing Spread.** Although still relatively high, ocean freight rates for major grain routes fell during first quarter 2005. The fall is largely due to temporarily diminished shipping during various holidays around the world. Rates for the benchmark grain route, U.S. Gulf (Gulf) to Japan, averaged about \$61 per metric ton (mt) during first quarter 2005, a 9-percent decrease from first quarter 2004. For the Pacific Northwest (PNW) to Japan, rates averaged about \$38 per mt, down 15 percent from first quarter 2004 and down 9 percent from fourth quarter 2004. Rates for the Gulf to Rotterdam (transatlantic) averaged just over \$37 per mt, a 4-percent reduction from the first and fourth quarters of 2004.

Despite declining, ocean rates still remain high, and the spread between Gulf and PNW rates has increased. The spread (difference) between the Gulf to Japan and PNW to Japan ocean freight rates increased 17 percent over fourth quarter 2004, and was slightly more than first quarter 2004. The spread averaged over \$23 during the first quarter of 2005 compared with a 3-year average of \$13 per mt. When the spread is this great, and railroads do not increase their rates to offset the increased spread, some grain exports are diverted from the Gulf to the PNW. During first quarter 2005, grain inspected for export from the PNW increased by 3 percent over first quarter 2004, while exports from the Gulf were down 14 percent. Consequently, PNW's share of U.S. grain exports increased from 25 percent in first quarter 2004 to 28 percent in first quarter 2005, while the Gulf share decreased from 70 to 64 percent. [Surajudeen.Olowolayemo@USDA.gov](mailto:Surajudeen.Olowolayemo@USDA.gov)

**High Rates Lead to Ease in Dry Bulk Vessel Supply.** Strong global demand for iron ore, coal, and other bulk commodities is contributing to the higher ocean freight rates. In turn, higher rates are encouraging orders for new vessels and delaying retirements of older vessels. Consequently, the supply of dry bulk vessels is expected to increase. At the end of 2004, dry bulk vessels larger than 10,000 dead-weight tonnage totaled 5,926, an increase of 220 vessels (22 million dead-weight tonnage) over 2003. The number of Panamax vessels, those usually used for grain shipments, increased by 83. Most of the fleet's growth is attributed to the unprecedented low level of dry bulk vessel retirements during 2004.

Orders for new dry bulk vessels at the end of 2004 amounted to almost 64 million dead-weight tonnage, or approximately 20 percent of the existing fleet. An estimated 22 million dead-weight tonnage of dry bulk vessels will be delivered in 2005. Panamax vessels will remain the most popular in the fleet. The increase in dry bulk vessel supply should bring relief to shippers through lower rates or slower increases in ocean freight rates. [www.drewry.co.uk](http://www.drewry.co.uk), [Surajudeen.Olowolayemo@USDA.gov](mailto:Surajudeen.Olowolayemo@USDA.gov)

**As U.S. Containerized Grain Exports Grow, Container Shortages Appear.** Exporting grain in containers is growing as U.S. grain exporters find buyers in Japan, Taiwan, and Indonesia who demand identity preserved and specialty grains. The percentage of U.S. grain exported in containers grew to just under 3 percent of all grain exports in 2004. Compared to 2003, U.S. containerized grain shipments to Asia grew by more than 50 percent during 2004. January 2005 containerized grain exports to Asia grew almost 90 percent over January 2004 (figure 14 inside).

As U.S. containerized grain exports continue to grow, grain exporters are increasingly confronting shortages of containers even though thousands of empty containers are exported to Asia daily. January and February Port of Los Angeles statistics for 2005 show that nearly 70 percent of containers were exported empty. Sixty-six percent of containers were exported empty during 2004. Ironically, to maximize revenues, ocean carriers choose to send empty containers back to Asia to expedite the containers' return trip to the United States. For carriers, more revenue is earned on the eastbound shipments of high-value consumer goods to the United States than on the westbound movement of lower-valued agricultural products to Asia. [April.Taylor@USDA.gov](mailto:April.Taylor@USDA.gov)

## Grain Transportation Indicators

**Table 1--Grain transport cost indicators\***

	Truck	Rail	Barge	Ocean	
Week ending				Gulf	Pacific
04/13/05	155	56	134	279	249
<b>Compared with last week</b>	<b>unchanged</b>	<b>↓</b>	<b>↓</b>	<b>↑</b>	<b>↓</b>

\*Indicator: Base year 2000 = 100; Weekly updates include truck = diesel (\$/gallon); rail = nearby secondary rail market (\$/car);

barge = spot Illinois River basis (index = percent of tariff rate); and ocean = routes to Japan (\$/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

**Table 2--Market update: U.S. origins to export position price spreads (\$/bushel)**

Commodity	Origin--destination	4/8/2005	4/1/2005
Corn	IL--Gulf	-0.54	-0.51
Corn	NE--Gulf	-0.67	-0.63
Soybean	IA--Gulf	-0.65	-0.69
HRW	KS--Gulf	-0.83	-0.83
HRS	ND--Portland	-1.37	-1.44

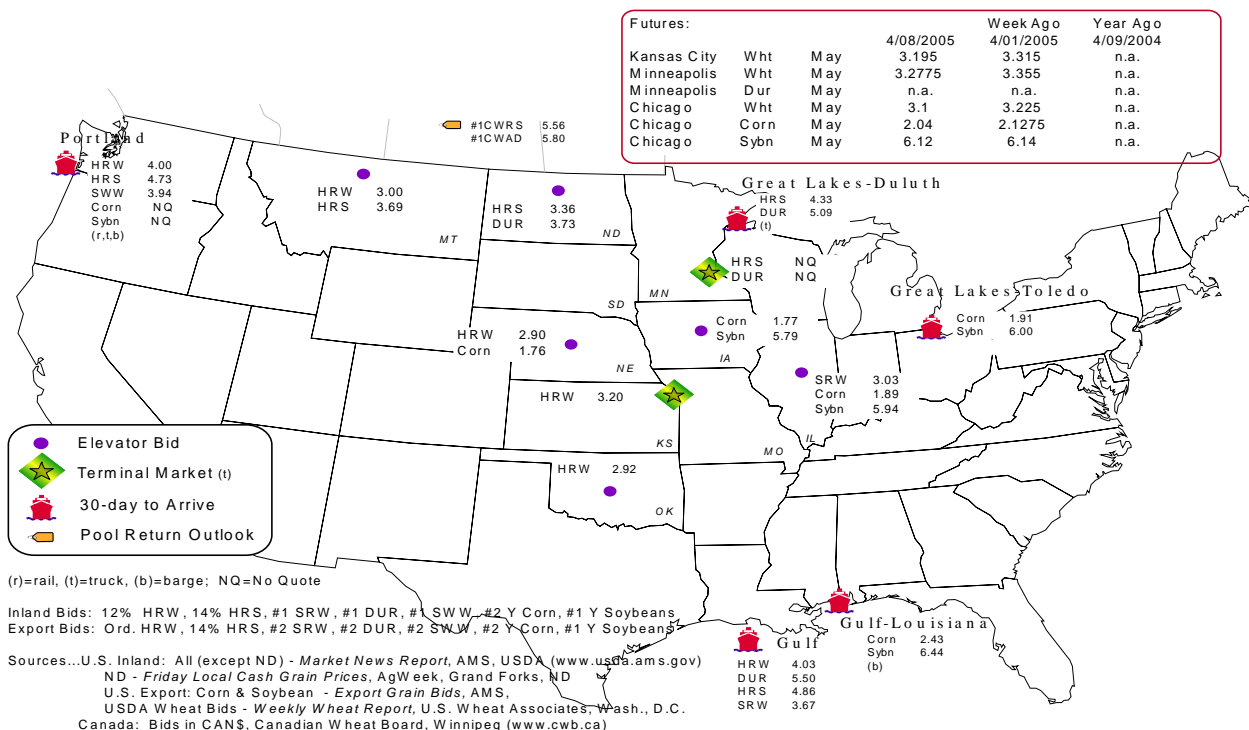
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Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1  
**Grain bid summary**



# Rail Transportation

**Table 3--Rail deliveries to port (carloads)\***

Week ending	Mississippi Gulf	Texas Gulf	Cross-Border Mexico	Pacific Northwest	Atlantic & East Gulf	Total
04/06/2005 <sup>p</sup>	266	1,464	1,437	4,393	196	7,756
03/30/2005 <sup>r</sup>	65	1,793	1,928	3,904	261	7,951
2005 YTD	4,787	25,135	22,677	63,834	6,343	122,776
2004 YTD	2,855	34,543	12,046	60,564	3,327	113,335
2005 as % of 2004	168	73	188	105	191	108
Total 2004	10,475	92,073	67,992	209,625	10,986	391,151
Total 2003**	14,843	88,194	48,805	157,125	20,509	329,476

(\*) Incomplete Data; as of 9/22/04, Cross-Border movements included; (\*\*) Excludes 53rd week; YTD = year-to-date; p = preliminary data;

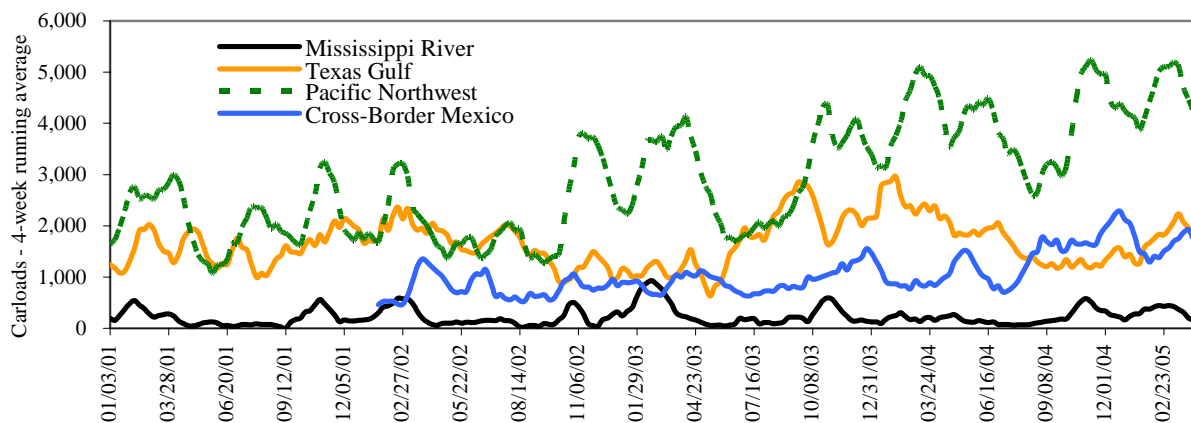
r = revised data

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 40 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

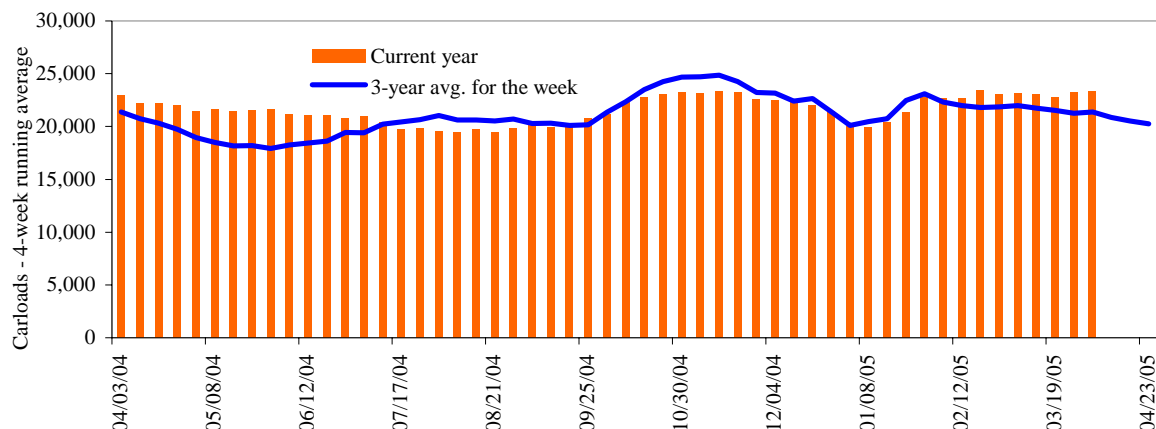
## Rail deliveries to port



Source: Transportation & Marketing Programs/AMS/USDA

Figure 3

## Total weekly U.S. grain car loadings for Class I railroads



Source: Association of American Railroads

**Table 4--Class I rail carrier grain car bulletin (grain carloads originated)**

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
04/02/05	3,063	3,399	9,509	601	6,568	23,140	4,728	4,447
This week last year	2,955	3,196	9,850	519	6,781	23,301	5,016	3,958
2005 YTD	41,109	44,827	126,421	8,867	78,411	299,635	59,028	50,927
2004 YTD	39,264	44,079	123,279	7,371	87,414	301,407	61,148	45,132
2005 as % of 2004	105	102	103	120	90	99	97	113
Total 2004	142,206	169,650	458,587	27,618	327,510	1,125,571	237,664	210,060

Source: Association of American Railroads (www.aar.org); YTD = year-to-date

**Table 5--Rail car auction offerings, week ending 4/9/05 (\$/car)\***

Delivery for:	May-05	Jun. 05	Jul. 05
BNSF <sup>1</sup>			
COT/N. grain	no offer	no bid	\$53
COT/S. grain	no offer	\$56	\$72
UP <sup>2</sup>			
GCAS/Region 1	no offer	no bid	no offer
GCAS/Region 2	no offer	no bid	no offer

\*Average premium/discount to tariff, last auction

<sup>1</sup>BNSF - COT = Certificate of Transportation

N includes: ID, MN, MT, ND, OR, SD, WA, WI, WY, and Manitoba, Canada.

S includes: CO, IA, IL, KS, MO, NE, OK, TX, NM, AZ, CA, UT, and NV.

<sup>2</sup>UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

Source: Transportation & Marketing Programs/AMS/USDA

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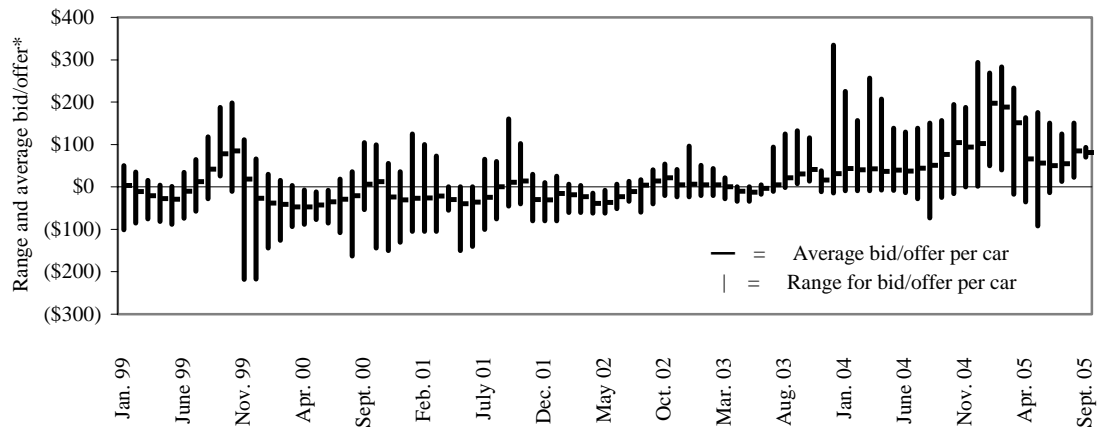
Rail service may be ordered directly from the railroad via **auction** for guaranteed service or tariff for nonguaranteed service or through the secondary market.

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The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4

**Secondary rail car market, delivery month-year**



\*up to 6 months of trading

Source: Transportation & Marketing Programs/AMS/USDA

**Average bid/offer** is the simple average of all the weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

**Range for bid/offer** shows the range of average weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

**Table 6--Weekly secondary rail car market, week ending 4/9/05 (\$/car)\***

	Delivery period			
	May-05	Jun-05	Jul-05	Aug-05
BNSF-GF	\$13	\$19	\$34	\$92
Change from last week	-\$13	-\$6	-\$8	-\$2
UP-Pool	-\$92	-\$8	\$22	\$69
Change from last week	-\$19	-\$3	\$1	\$1

\*Average premium/discount to tariff, \$/car-last week

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,

Missing value = no bid quoted; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

Data from Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

**Table 7--Tariff rail rates for unit and shuttle train shipments\***

<b>Effective date:</b>					
4/4/2005	<b>Origin region</b>	<b>Destination region</b>	<b>Rate/car</b>	<b>Rate/metric ton</b>	<b>Rate/bushel**</b>
<b><u>Unit train*</u></b>					
Wheat	Minneapolis, MN	Houston, TX	\$2,420	\$26.68	\$0.73
	Kansas City, MO	Galveston, TX	\$1,920	\$21.16	\$0.58
	Minneapolis, MN	Portland, OR	\$4,148	\$45.72	\$1.24
	St. Louis, MO	Houston, TX	\$2,145	\$23.64	\$0.64
	Chicago, IL	Albany, NY	\$1,861	\$20.51	\$0.56
	Chicago, IL	Richmond, VA	\$2,002	\$22.07	\$0.60
Corn	Minneapolis, MN	Portland, OR	\$3,600	\$39.68	\$1.01
	Chicago, IL	Baton Rouge, LA	\$2,510	\$27.67	\$0.70
	Council Bluffs, IA	Baton Rouge, LA	\$2,370	\$26.12	\$0.66
	Evansville, IN	Raleigh, NC	\$1,791	\$19.74	\$0.50
	Council Bluffs, IA	Stockton, CA	\$3,606	\$39.75	\$1.01
	Kansas City, MO	Dalhart, TX	\$1,965	\$21.66	\$0.55
	Columbus, OH	Raleigh, NC	\$1,700	\$18.74	\$0.48
	Minneapolis, MN	Portland, OR	\$3,610	\$39.79	\$1.08
Soybeans	Chicago, IL	Baton Rouge, LA	\$2,455	\$27.06	\$0.74
	Council Bluffs, IA	Baton Rouge, LA	\$2,315	\$25.52	\$0.69
	Evansville, IN	Raleigh, NC	\$1,791	\$19.74	\$0.54
	Chicago, IL	Raleigh, NC	\$2,391	\$26.36	\$0.72
<b><u>Shuttle Train*</u></b>					
Wheat	St. Louis, MO	Houston, TX	\$1,895	\$20.89	\$0.57
	Minneapolis, MN	Portland, OR	\$3,993	\$44.01	\$1.20
Corn	Fremont, NE	Houston, TX	\$2,665	\$29.38	\$0.75
	Minneapolis, MN	Portland, OR	\$3,450	\$38.03	\$0.97
Soybeans	Council Bluffs, IA	Houston, TX	\$2,785	\$30.70	\$0.84
	Minneapolis, MN	Portland, OR	\$3,410	\$37.59	\$1.02

\*A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of more than 100 cars that meet railroad efficiency requirements.

\*\*Approximate load per car = 100 short tons: corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

Sources: [www.bnsf.com](http://www.bnsf.com), [www.cpr.ca](http://www.cpr.ca), [www.csx.com](http://www.csx.com), [www.uprr.com](http://www.uprr.com)

**Table 8--Tariff rail rates for U.S. bulk grain shipments to the U.S.-Mexico border**

<b>Effective date:</b>						
4/4/2005	Origin state	Border crossing region	Train size	Rate/car <sup>1</sup>	Rate/metric ton	Rate/bushel**
Wheat	KS	Brownsville, TX	Shuttle	\$2,742	\$28.02	\$0.76
	ND	Eagle Pass, TX	Shuttle	\$5,426	\$55.44	\$1.51
	OK	El Paso, TX	Shuttle	\$2,155	\$22.02	\$0.60
	OK	El Paso, TX	Unit	\$2,241	\$22.90	\$0.62
	AR	Laredo, TX	Unit	\$2,165	\$22.12	\$0.60
	IL	Laredo, TX	Shuttle	\$2,970	\$30.35	\$0.83
	MT	Laredo, TX	Shuttle	\$5,691*	\$58.14	\$1.58
	TX	Laredo, TX	Shuttle	\$1,598*	\$16.33	\$0.44
	MO	Laredo, TX	Unit	\$2,678*	\$27.37	\$0.74
	WI	Laredo, TX	Unit	\$3,188	\$32.57	\$0.89
Corn	NE	Brownsville, TX	Shuttle	\$3,104	\$31.72	\$0.80
	NE	Brownsville, TX	Unit	\$3,537*	\$36.14	\$0.92
	IA	Eagle Pass, TX	Shuttle	\$3,334	\$34.07	\$0.86
	MO	Eagle Pass, TX	Shuttle	\$3,040*	\$31.06	\$0.79
	NE	Eagle Pass, TX	Shuttle	\$3,440*	\$35.15	\$0.89
	IA	Laredo, TX	Unit	\$3,225*	\$32.95	\$0.84
Soybean	IA	Brownsville, TX	Shuttle	\$2,880	\$29.43	\$0.80
	MN	Brownsville, TX	Shuttle	\$3,176	\$32.45	\$0.88
	NE	Brownsville, TX	Shuttle	\$2,688	\$27.47	\$0.75
	NE	Eagle Pass, TX	Shuttle	\$2,765	\$28.25	\$0.77
	IA	Laredo, TX	Unit	\$2,918	\$29.82	\$0.81

A unit train refers to shipments of at least 52 cars. Shuttle train are available for qualified shipments of more than 100 cars that meet railroad efficiency requirements.

<sup>1</sup>Rates are based upon published tariff rates for high-capacity rail cars.

\*High-capacity rate not available, rate estimated using published low-capacity tariff rate x 1.08

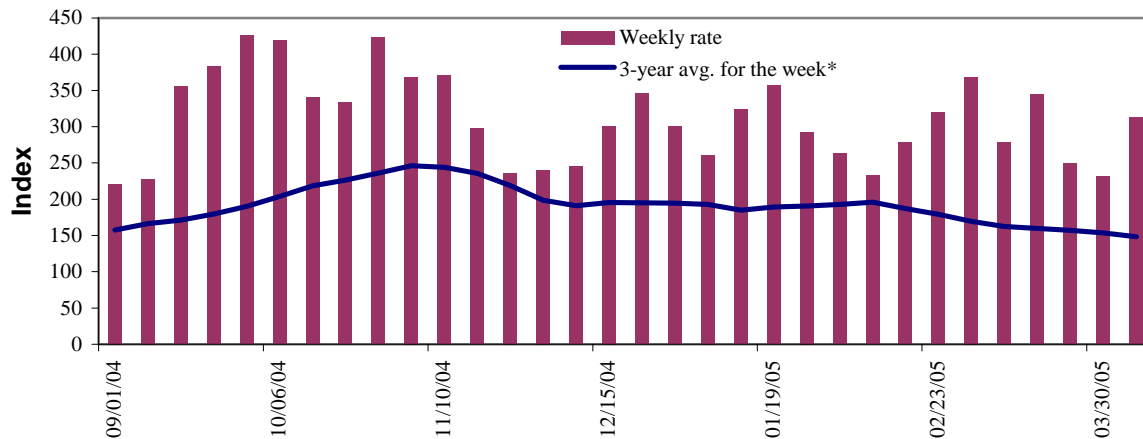
\*\*Approximate load per car = 97.87 metric tons: Corn 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

Sources: www.bnsf.com, www.uprr.com

# Barge Transportation

Figure 5

Illinois River barge rate index - quotes



Note: Index = percent of tariff rate; \*4-week moving average

Source: Transportation & Marketing Programs/AMS/USDA

The **Illinois River barge rate index** averaged 183 percent of the **benchmark tariff rates** between 1999 and 2001, based on weekly market quotes. The **index**, along with **rate quotes** and **futures market bids** are indicators of grain transport supply and demand.

Table 9--Barge rate quotes: southbound barge freight

Location	4/6/2005	3/30/2005	May '05	July '05
Twin Cities	307	270	282	290
Mid-Mississippi	316	243	264	274
Illinois River	313	231	252	263
St. Louis	221	171	196	216
Lower Ohio	235	208	210	223
Cairo-Memphis	210	167	187	206

Index = percent of tariff, based on 1976 tariff benchmark rate

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Benchmark tariff rates

## Calculating barge rate per ton:

(Index \* 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map (see figure 6).

Note: The Illinois barge rate is for Beardstown, IL, La Grange Lock & Dam (L&D 8).

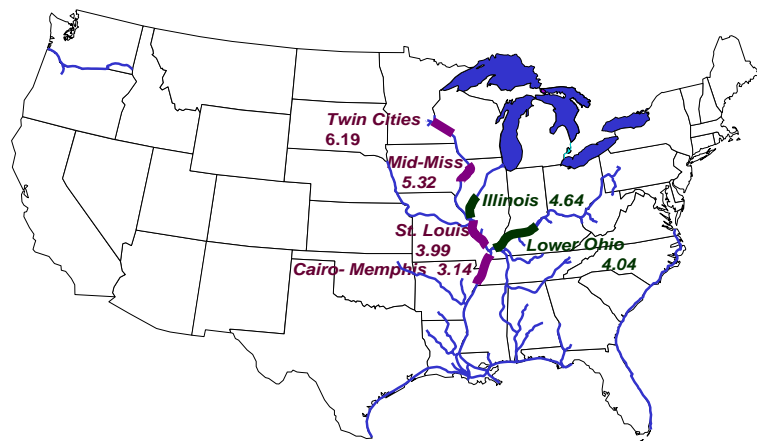
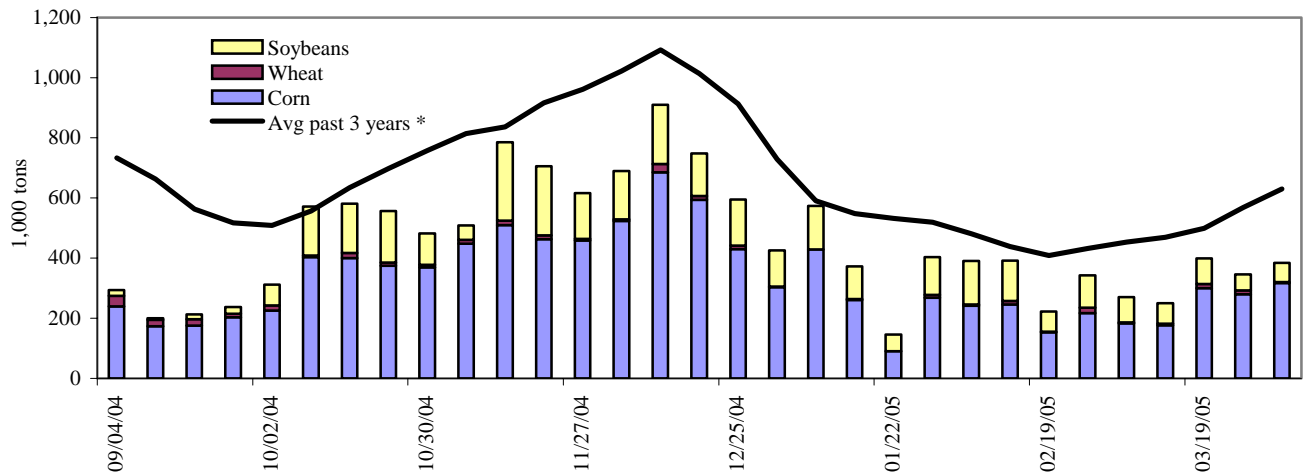




Figure 7

**Barge movements on the Mississippi River (Locks 27 - Granite City, IL)**

\* 4-week moving average

Source: Transportation &amp; Marketing Programs/AMS/USDA

**Table 10--Barge grain movements (1,000 tons)**

Week ending 4/2/2005	Corn	Wheat	Soybean	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	47	0	6	0	53
Winfield, MO (L25)	195	0	35	0	230
Alton, IL (L26)	298	3	47	5	354
Granite City, IL (L27)	317	3	64	5	389
<b>Illinois River (L8)</b>	73	3	11	0	87
<b>Ohio River (L52)</b>	66	2	37	3	107
<b>Arkansas River (L1)</b>	0	22	18	0	39
2005 YTD	4,490	391	2,259	205	7,344
2004 YTD	5,549	632	1,648	257	8,086
2005 as % of 2004 YTD	81	62	137	80	91
Total 2004	26,235	2,701	6,784	843	36,563

YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1.

"Other" refers to oats, barley, sorghum, and rye.

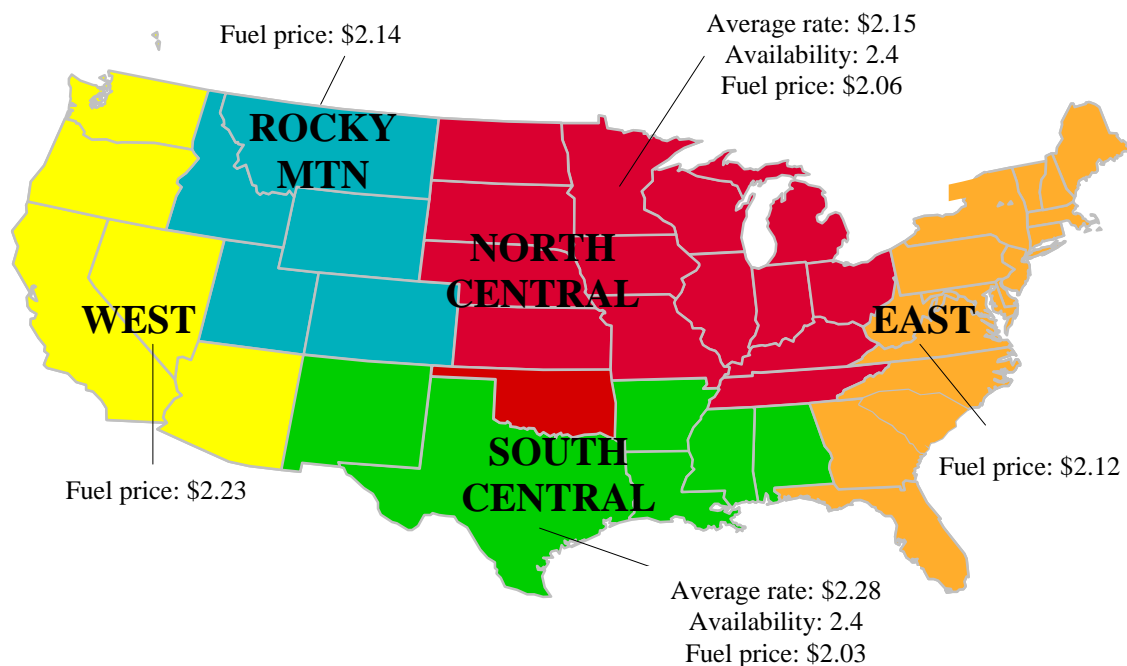
Source: U.S. Army Corp of Engineers ([www.mvr.usace.army.mil/mvrirmi/omni/webprts/default.asp](http://www.mvr.usace.army.mil/mvrirmi/omni/webprts/default.asp))

Note: Total may not add exactly, due to rounding

# Truck Transportation

Figure 8

U.S. grain truck market advisory, 4<sup>th</sup> quarter 2004\*



\*Average rate per loaded mile, based on truck rates for trips of 25, 100, and 200 miles

Note: Fuel prices are a quarterly average (unit per gallon)

Fuel price data source: Energy Information Administration, U.S. Department of Energy, [www.eia.doe.gov](http://www.eia.doe.gov)

Table 11--U.S. grain truck market overview, 4<sup>th</sup> quarter 2004

Region/commodity*	25 miles	100 miles	200 miles	Truck availability	Truck activity	Future truck activity
	Rate per mile			Rating compared to same quarter last year		
				1=Very easy to 5=Very difficult	1=Much lower to 5=Much higher	
<b>National average<sup>1</sup></b>	<b>2.89</b>	<b>1.94</b>	<b>1.75</b>	<b>2.5</b>	<b>3.2</b>	<b>2.9</b>
<b>North Central region<sup>2</sup></b>	2.75	1.97	1.74	2.4	3.5	3.0
Corn	3.03	1.95	1.88	2.1	3.6	3.0
Wheat	2.27	2.05	1.67	2.6	3.0	2.8
Soybean	2.94	1.88	1.97	1.9	3.4	2.8
<b>South Central region<sup>2</sup></b>	3.03	1.95	1.86	2.4	2.6	2.3
Corn	3.06	1.97	1.82	2.3	2.5	2.3
Wheat	2.75	1.85	1.78	2.3	3.0	2.5
Soybean	3.39	2.21	2.11	1.5	2.3	2.3

Rates are based on trucks with 80,000 lb weight limit

\*Commodity averages based on truck rates for top producing states based on National Agricultural Statistics Service/USDA

<sup>1</sup>National average includes: AR, CO, IA, IL, IN, KS, LA, MN, MS, ND, NE, OH, OK, OR, SD, TX, and WA.

<sup>2</sup>Commodity rates per mile include the average of the top 3 producing states within the region.

Source: Transportation and Marketing Programs/AMS/USDA

The **weekly diesel price** provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for truck grain movements, accounting for 37 percent of the estimated variable cost.

**Table 12--Retail on-highway diesel prices\*, week ending 04/11/05 (US\$/gallon)**

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.306	0.007	0.666
	New England	2.434	0.007	0.686
	Central Atlantic	2.423	0.011	0.702
	Lower Atlantic	2.244	0.006	0.648
II	Midwest	2.263	0.005	0.632
III	Gulf Coast	2.251	0.011	0.646
IV	Rocky Mountain	2.399	0.038	0.651
V	West Coast	2.585	0.044	0.559
	California	2.625	0.044	0.463
Total	U.S.	2.316	0.013	0.637

\*Diesel fuel prices include all taxes.

Source: Energy Information Administration/U.S. Department of Energy ([www.eia.doe.gov](http://www.eia.doe.gov))

# Grain Exports

**Table 13--U.S. export balances (1,000 metric tons)**

Week ending 1/	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
3/31/2005	1,367	231	1,291	556	73	3,519	7,395	2,640	13,554
This week year ago	1,991	776	1,297	845	124	5,033	9,051	1,914	15,998
Cumulative exports-crop year 2/									
2004/05 YTD	8,124	2,997	6,614	4,195	594	22,524	26,617	24,745	73,886
2003/04 YTD	10,762	3,180	5,576	4,210	904	24,632	28,854	21,636	75,122
2004/05 as % of 2003/04	75	94	119	100	66	91	92	114	98
2003/04 Total	12,697	3,785	6,928	4,889	1,053	29,353	47,704	24,102	101,159
2002/03 Total	6,896	2,899	6,645	3,517	720	20,677	39,646	28,908	89,231

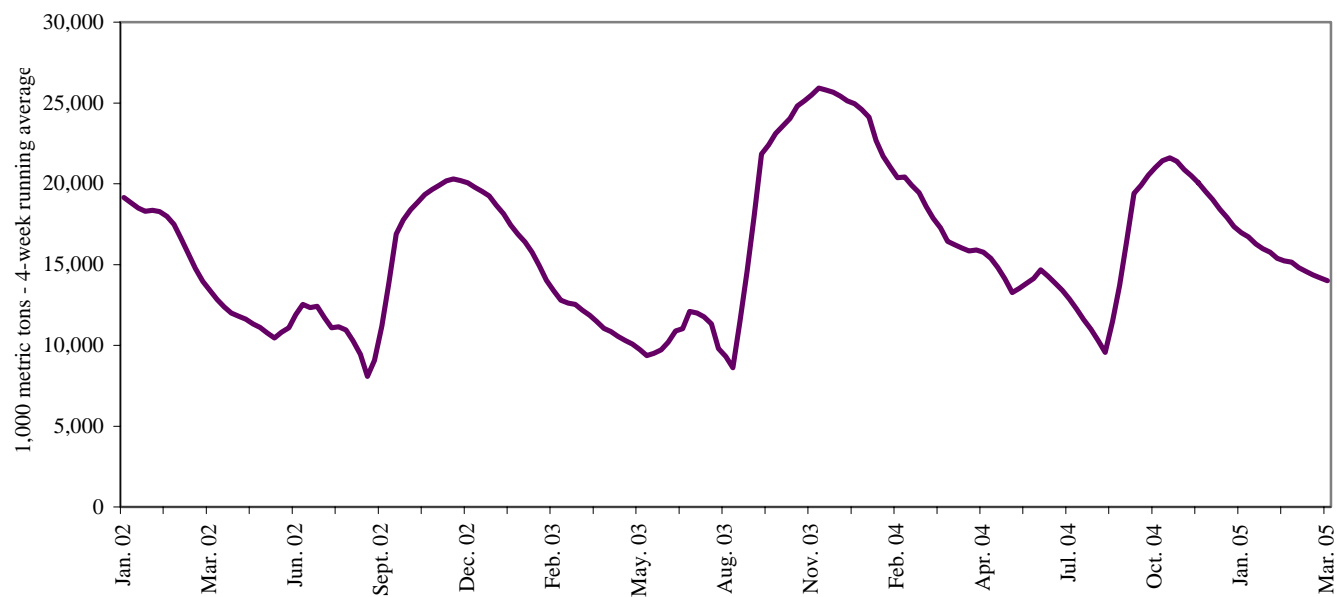
Note: YTD = year-to-date. Crop year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31, 1/ = Current outstanding unshipped export sales to date

2/ = New crop year in effect for corn and soybean sales

Source: Foreign Agricultural Service/USDA ([www.fas.usda.gov](http://www.fas.usda.gov))

Figure 9

**U.S. grain, unshipped export balance, including wheat, corn, and soybean sales**



Source: Foreign Agricultural Service/USDA ([www.fas.usda.gov](http://www.fas.usda.gov))

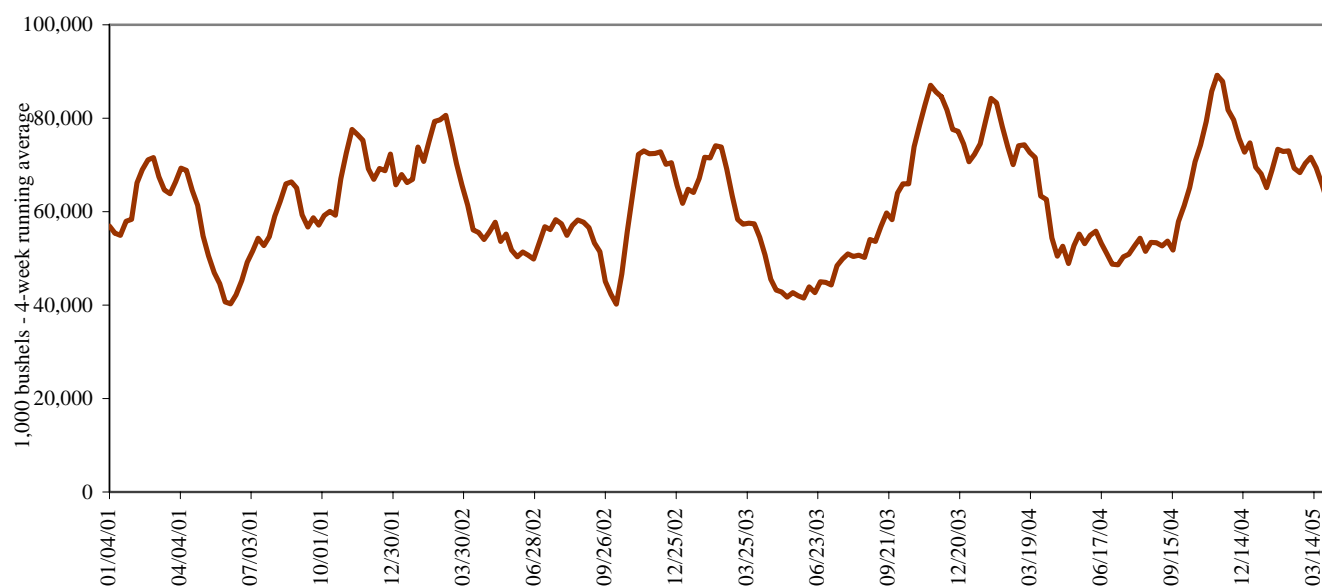
**Table 14--Select U.S. port regions - grain inspections for export (1,000 metric tons)**

Week ending	Pacific Region			Mississippi Gulf			Texas Gulf			Port Region total		
	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Pacific	Mississippi	Texas
04/07/05	308	132	119	116	473	94	34	0	0	559	683	34
2005 YTD	3,034	2,352	2,347	1,564	7,186	6,292	1,608	214	6	7,733	15,043	1,828
2004 YTD	3,169	2,692	1,614	2,004	9,331	5,068	3,015	44	7	7,474	16,404	3,066
2005 as % of 2004	96	87	145	78	77	124	53	490	86	103	92	60
2004 Total *	12,121	9,741	4,753	7,154	32,851	15,540	7,936	131	23	26,615	55,546	8,089

Source: Federal Grain Inspection Service/USDA ([www.usda.gov/gipsa](http://www.usda.gov/gipsa)); YTD: year-to-date; \* includes 53rd week

The United States exports approximately one-quarter of the grain it produces. On average, it includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Over 60 percent of these U.S. export grain shipments departed through the Mississippi Gulf region in 2003.

Figure 10

**U.S. grain inspected for export (wheat, corn, and soybeans)**

Source: Federal Grain Inspection Service/USDA ([www.usda.gov/gipsa](http://www.usda.gov/gipsa))

# Ocean Transportation

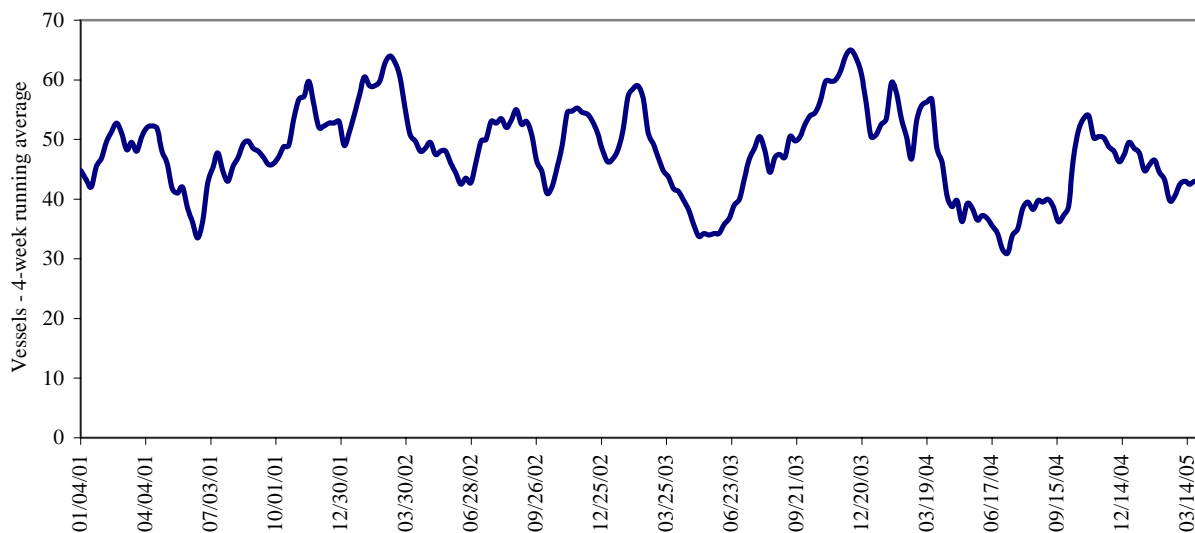
**Table 15--Weekly port region grain ocean vessel activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
4/7/2005	16	32	51	7	5
3/31/2005	17	38	47	13	3
2004 range	(10..43)	(25..73)	(38..96)	(4..16)	(0..18)
2004 avg.	24	45	61	9	6

Source: Transportation & Marketing Programs/AMS/USDA

Figure 11

**Gulf Port grain vessel loading (past 7 days)**



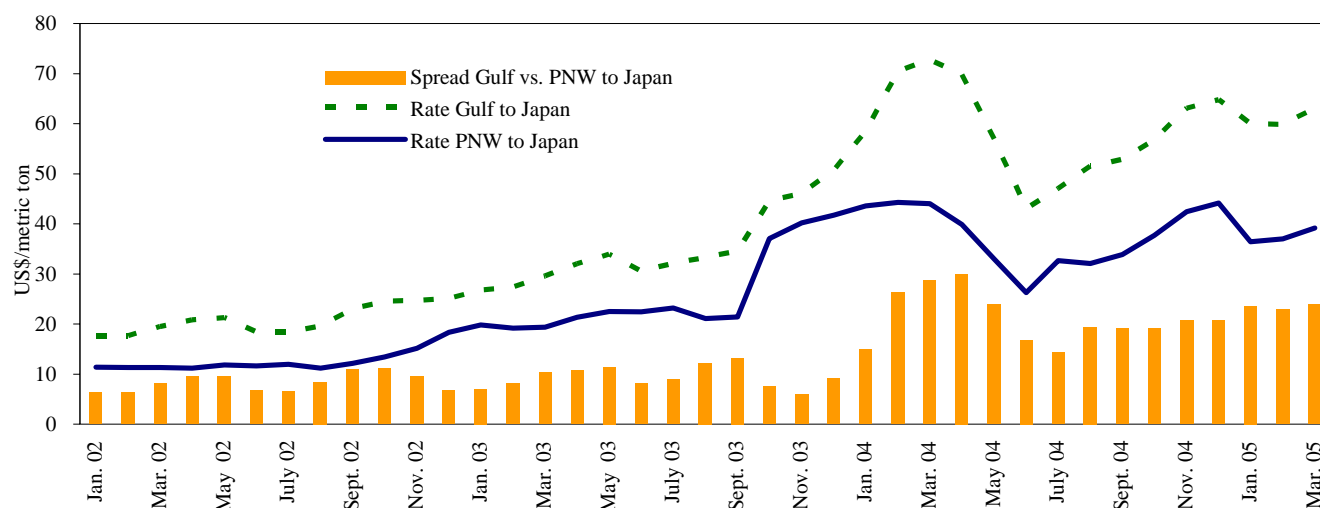
Source: Transportation & Marketing Programs/AMS/USDA

**Table 16--Quarterly ocean freight rates (average rates & percentage changes) (US\$/metric ton)**

Countries/ regions	2005 1st qtr	2004 1st qtr	Percent change	Countries/ regions	2005 1st qtr	2004 1st qtr	Percent change
<b>Gulf to</b>				<b>Pacific NW to</b>			
Japan	\$60.18	\$73.75	-18	Japan	---	---	---
China	\$57.50	\$46.63	23	<b>Argentina/Brazil to</b>			
Taiwan	---	\$68.00	---	N. Africa	\$59.25	\$61.07	-3
N. Africa	\$48.00	\$46.25	4	China	---	---	---
Med. Sea	---	\$46.50	---				

Source: Maritime Research, Inc. (www.maritime-research.com)

Figure 12

**Grain vessel rates, U.S. to Japan**

Source: Baltic Exchange (www.balticexchange.com)

**Table 17--Ocean freight rates for selected shipments, week ending 04/09/05**

Export region	Import region	Grain	Month	Volume loads (metric tons)	Freight rate (\$/metric ton)
U.S. Gulf	Mauritania	Wheat	Mar 7/17	8,750	69.75
U.S. Gulf	Algeria	Hvy Grain	Apr 25/30	25,000	65.00
PNW	Kenya	Wheatflour	Mar 5/15	34,000	74.00
River Plate	Poland	Hvy Grain	Apr 20/30	30,000	64.00
River Plate	Algeria	Wheat	Feb 5/15	25,000	59.50

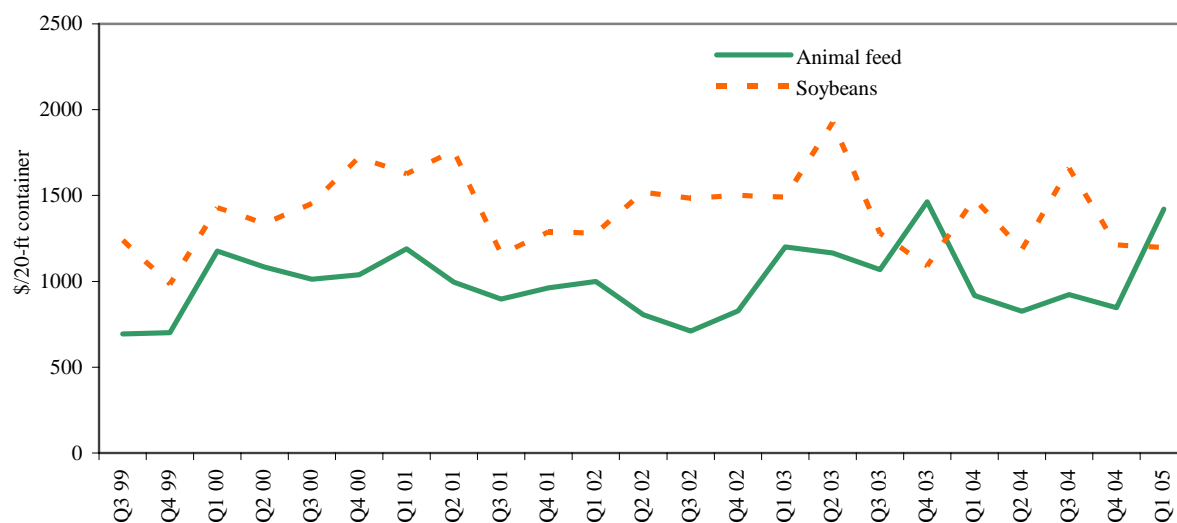
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

\*Most food aid from the United States is required to be shipped on U.S. flag vessels. The vessels are limited in availability resulting in higher rates. In addition, destinations receiving food aid generally lack adequate port unloading facilities, requiring the vessel to remain in port for a longer duration than normal.

Source: Maritime Research Inc. (www.maritime-research.com)

Figure 13

**Weighted average rates<sup>1</sup> for containerized shipments of animal feed and soybeans to selected Asian countries**



<sup>1</sup> Animal Feed: Busan-Korea (22%), Kaohsiung-Taiwan (28%), Tokyo-Japan (38%), Hong Kong (9%), Bangkok-Thailand (3%) and soybeans: Busan-Korea (1%), Keelung-Taiwan (81%), Tokyo-Japan (12%), Bangkok-Thailand (4%), Hong Kong (1%)

Quarter 1, 2005.

Source: Ocean Rate Bulletin, Transportation & Marketing Programs/AMS/USDA

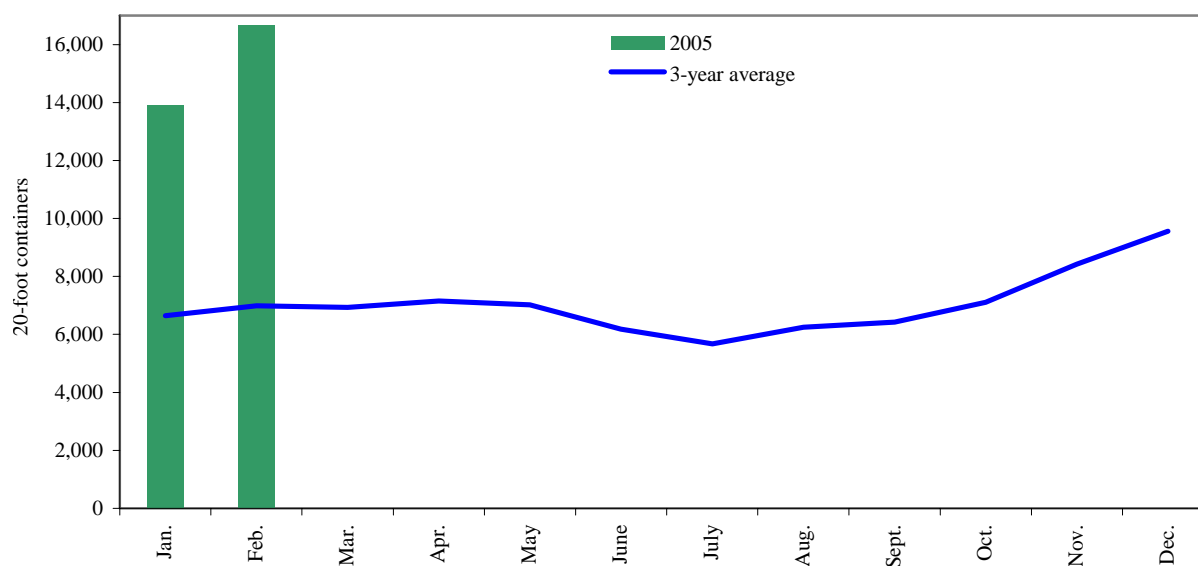
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Container ocean freight rates – average rate per twenty-foot equivalent unit (TEU) weighted by shipping line market share and trade route.

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Figure 14

**Monthly shipments of containerized grain to Asia for 2005 compared with a 3-year average**



Source: Port Import Export Reporting Service (PIERS), *Journal of Commerce*

Note: PIERS data is available with a lag of approximately 40 days



# Contacts and Links

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## Related Websites

<i>Agricultural Container Indicators</i>	<a href="http://www.ams.usda.gov/tmd2/agci/">http://www.ams.usda.gov/tmd2/agci/</a>
<i>Ocean Rate Bulletin</i>	<a href="http://www.ams.usda.gov/tmd/Ocean/index.asp">http://www.ams.usda.gov/tmd/Ocean/index.asp</a>

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